LAC GROUP

Research Monitor

February 13, 2019

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ResearchMonitor

priory solutions
A TRG COMPANY

What is ResearchMonitor?

- Usage monitoring

  manage your external online database subscriptions
  your internal intranets & knowledge base portals
- Access Control & Password Management
- Contract Management

Who produces ResearchMonitor?

Named after the Lewes Priory in East Sussex, Priory Solutions was founded in 2003 by legal technologists Peter Borchers and Phillip Markwick.

Drawing from their legal sector experience they set out to create an electronic resource management solution which later evolved into our ResearchMonitor product. Philip left the business in 2007 shortly before now-CTO and co-director Rory Kingan joined Priory Solutions in 2008.

With an expanding client base in the UK and US we set about extending our product range over the next few years, adding additional library and resource management solutions to our suite of products. ResearchPath was released in 2011, SmartRecharge and ResearchHub in 2013 and most recently Quest was released in early 2015.

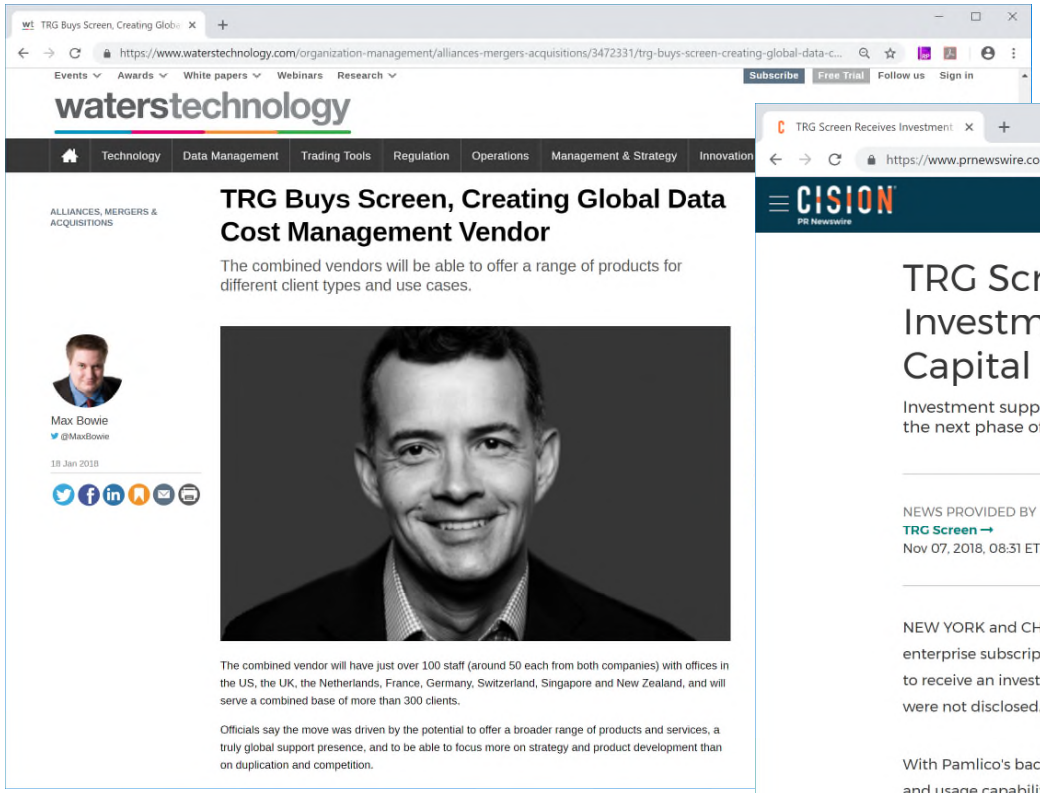
Being a small team we pride ourselves on punching above our weight in our scope of products, calibre of client base, and quality of client relationships built on excellent customer service. We strive to retain the energy of a start-up coupled with the ability to produce systems trusted by our large corporate clients.

We are privileged to have eight of the top ten global law firms as clients and have a client retention rate of approaching 100% - a metric we are dedicated to maintaining.

Our strong growth could not have been achieved without an exceptional team, which has expanded to be located in eight locations on four continents. With ten nationalities represented on the team we can safely call ourselves a global business. With core offices in London, Cape Town and Minneapolis we aim to find outstanding people to join our team regardless of their location.

We are looking forward to the next ten years of growth in partnership with our fantastic clients.

January 2018



ALLIANCES, MERGERS & ACQUISITIONS

TRG Buys Screen, Creating Global Data Cost Management Vendor

The combined vendors will be able to offer a range of products for different client types and use cases.

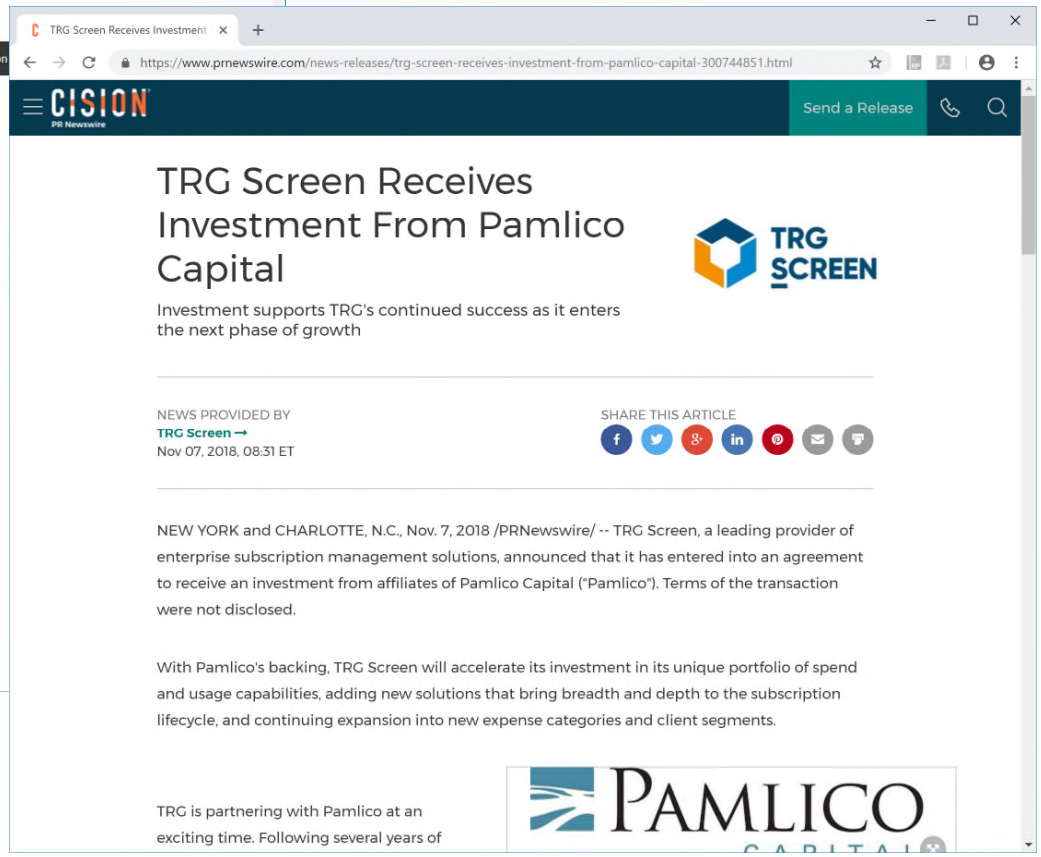
Max Bowie
@MaxBowie

18 Jan 2018

The combined vendor will have just over 100 staff (around 50 each from both companies) with offices in the US, the UK, the Netherlands, France, Germany, Switzerland, Singapore and New Zealand, and will serve a combined base of more than 300 clients.

Officials say the move was driven by the potential to offer a broader range of products and services, a truly global support presence, and to be able to focus more on strategy and product development than on duplication and competition.

November 2018



TRG Screen Receives Investment From Pamlico Capital

Investment supports TRG's continued success as it enters the next phase of growth

NEWS PROVIDED BY
TRG Screen
Nov 07, 2018, 08:31 ET

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NEW YORK and CHARLOTTE, N.C., Nov. 7, 2018 /PRNewswire/ -- TRG Screen, a leading provider of enterprise subscription management solutions, announced that it has entered into an agreement to receive an investment from affiliates of Pamlico Capital ("Pamlico"). Terms of the transaction were not disclosed.

With Pamlico's backing, TRG Screen will accelerate its investment in its unique portfolio of spend and usage capabilities, adding new solutions that bring breadth and depth to the subscription lifecycle, and continuing expansion into new expense categories and client segments.

TRG is partnering with Pamlico at an exciting time. Following several years of

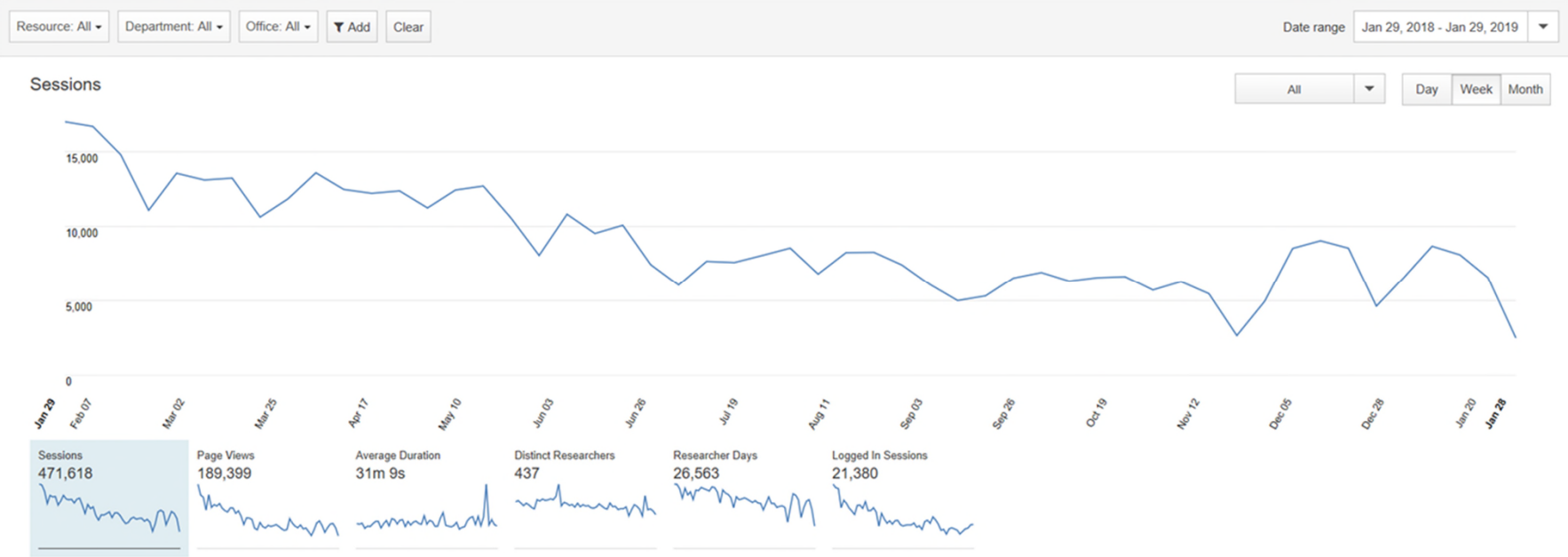
What is Usage Monitoring?

Usage Monitoring seamlessly records detailed information about the sources and databases searched, search terms used and result counts.

Key Features

- Reports usage across any web-based service, including internal firm systems.
- Reports usage by service, department, office, job title, and individuals.
- Usage is recorded down to individual level, regardless of whether users log in or use IP authentication.

Overall usage

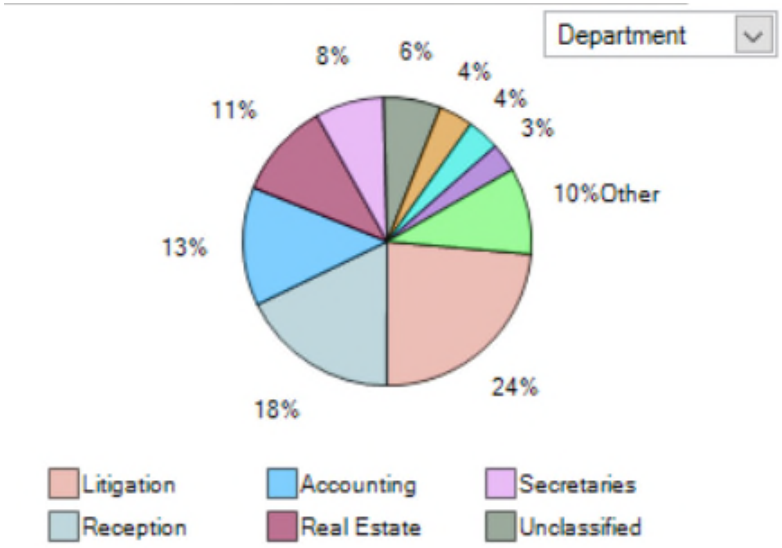


Reporting capabilities

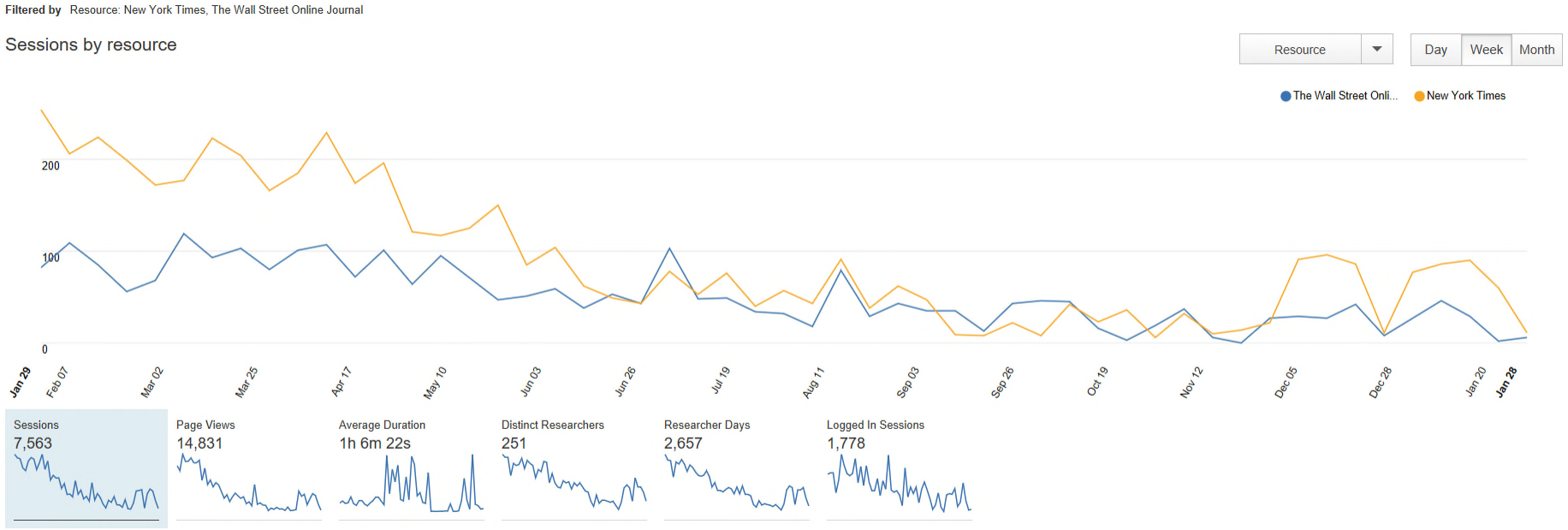
Track whatever you are interested in

Used Resources

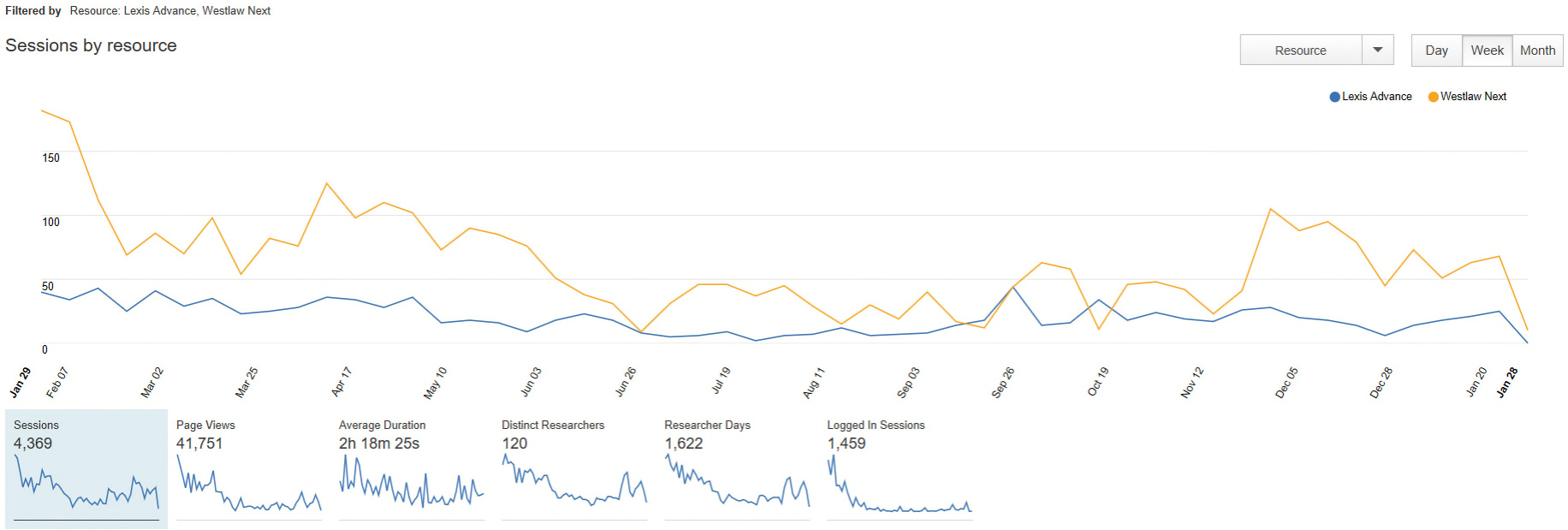
Resource	Sessions	Activities	Users
Facebook	10387	730	121
Google	9175	0	129
Twitter	5332	5123	105
Bing	3971	0	131
Herrick Intranet SupportResour...	1141	104	100
Herrick Intranet Search	588	1463	94
New York Times	324	1048	43
Linked In	281	692	49



Comparing usage of two resources – NYT vs WSJ

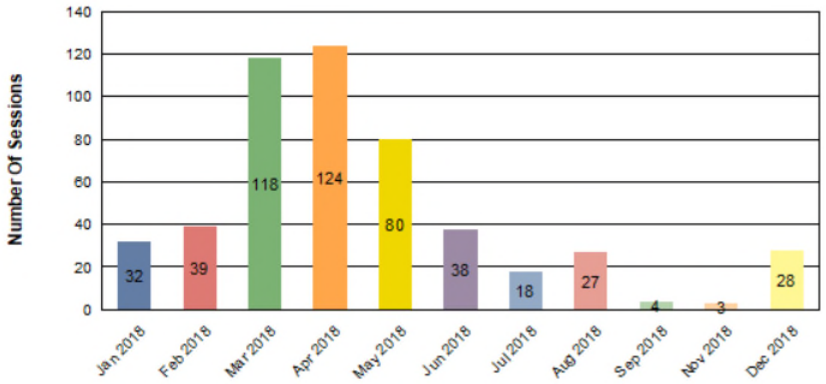


Comparing usage of two resources – Lexis vs Westlaw



Usage – Monthly or by Department

Monthly Usage Trend



Usage By Departments

Litigation	317	62.0%
Secretaries	107	20.9%
Library	25	4.9%
Real Estate	21	4.1%
Managing Attorney	14	2.7%
Tax	8	1.6%
Marketing	6	1.2%
Tax and Personal Planning	5	1.0%
Accounting	3	0.6%
Corporate	2	0.4%
Real Estate Planning and Development	2	0.4%
Information Technology	1	0.2%
Total:	511	100.0%

Usage – by Title or Individual User

Usage By Job Title

Partner	241	47.2%
Secretary	105	20.5%
Counsel	41	8.0%
Paralegal	32	6.3%
Associate	31	6.1%
Manager of Research and Knowledge Services	20	3.9%
Assistant Managing Attorney	8	1.6%
Staff Attorney	6	1.2%
Library Technical Services Assistant	5	1.0%
Managing Attorney	5	1.0%
Marketing Manager	4	0.8%
Chief Land Use and Development Specialist	2	0.4%
Chief Planning and Development Specialist	2	0.4%
Executive Assistant	2	0.4%
Senior Accountant	2	0.4%
Business Development Manager	1	0.2%
Business Development Specialist	1	0.2%
Court Clerk	1	0.2%
Director of Finance	1	0.2%
Technical Support Analyst	1	0.2%
Total	511	100.0%

Top 20 Researchers

Researcher	Sessions
Rocco, Victor (Litigation)	169
Trachtenberg, Andrea (Secretaries)	102
Skidmore, Jonathan (Litigation)	28
Werbin, Barry (Litigation)	24
Rosen, Nathan (Library)	20
D'Angelo, Jason (Litigation)	11
Selbst, Stephen (Litigation)	10
Im, Richard (Litigation)	9
Tuchman, Louis (Tax)	8
Levin, Mara (Litigation)	7
Newman, Jared (Litigation)	6
Berengarten, Michael (Litigation)	6
Berger, Alexander (Real Estate)	6
Pordes, Jennifer (Managing Attorney)	5
John, Laini (Managing Attorney)	5
Hirsch, Ross (Litigation)	5
Grillo, Allison (Library)	5
Bazian, Samuel (Litigation)	4
Poddar, Shivani (Litigation)	4
Jakoby, Arthur (Litigation)	4

Usage – what did they look at and how

Activity Meta Data Values

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Resource:	New York Times
Activity Date:	07-Dec-2018 12:01
Action:	Page View
Employee:	Tuchman, Louis

Attribute	AttributeValue
Page Title	Art Collectors Find Safe Harbor in Delaware's Tax Laws - The New York Times
URL	https://www.nytimes.com/2015/10/26/arts/design/art-collectors-find-safe-harbor-in-delawares-tax-laws.html

What is Access Control & Password Management?

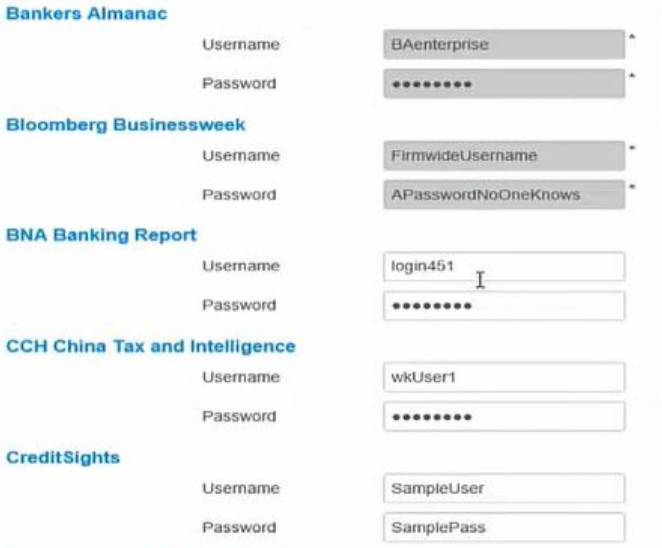
Access Control & Password Management eliminates wasted researcher time by automatically logging in users to online services they should have access to. Users no longer need to remember passwords and you can control access to services on an individual or group level where needed.

Key Features

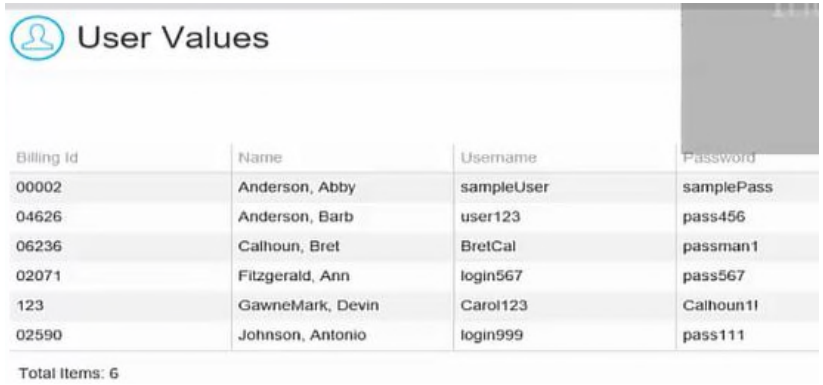
- Centrally store username and passwords for the entire firm, groups or individuals.
- Collect and store logon details when researchers access the database
- Prevent users without entitlement from accessing services
- Ability to display messages when accessing services

Access Control & Password Management

Firm wide username/passwords



Individual users username/passwords



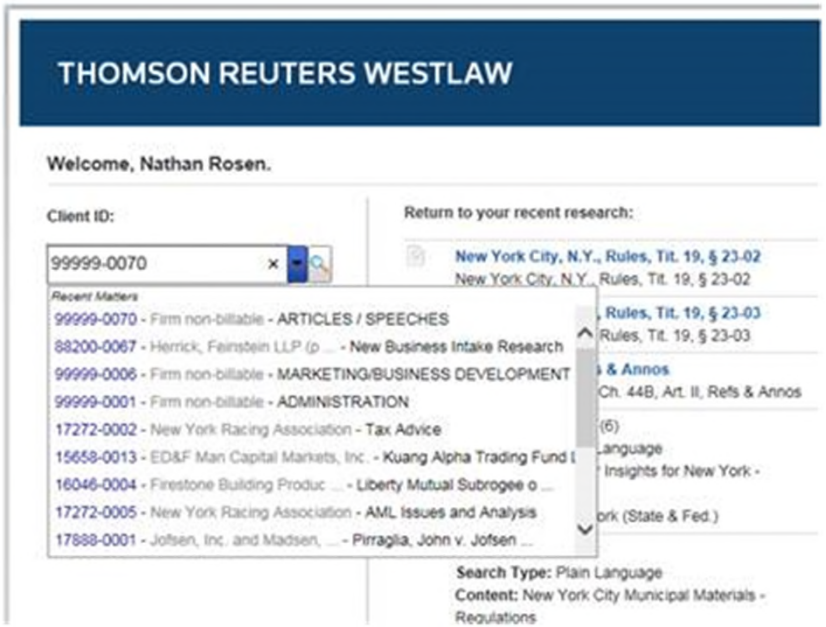
What is Client Validation & Cost Recovery?

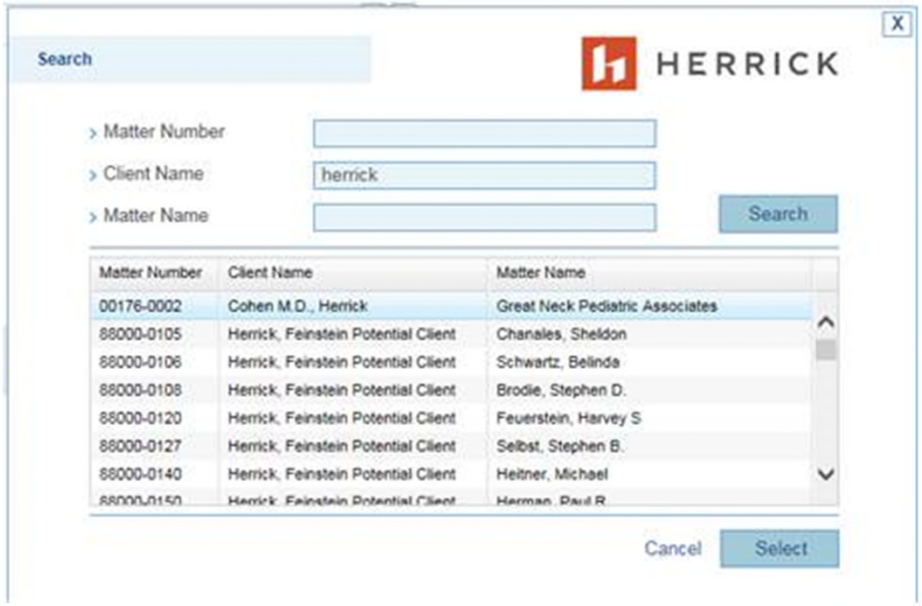
Client Validation & Cost Recovery validates client references entered in any online service against your current matter list, thus ensuring only valid references are used.
Feeds the information to your billing system, eliminating unnecessary manual effort and maximizing your recovery rates.

Key Features

- Researchers can select from their most recent codes, search for or enter a number directly.
- Validates against your current matter or deal code list, ensuring references are always valid
- Optionally request an activity description when using non-billable client references.
- Charges are recorded as they are incurred and stored centrally for reporting.
- Charges automatically sent to your billing or disbursement system
- Library administrators can easily configure costs for each service and type of activity.
- Rate cards can be set to apply discounts, include overheads or to simplify vendors' complex pricing.
- Can dramatically increase your recovery rates without changing your existing processes.

Client Validation & Cost Recovery





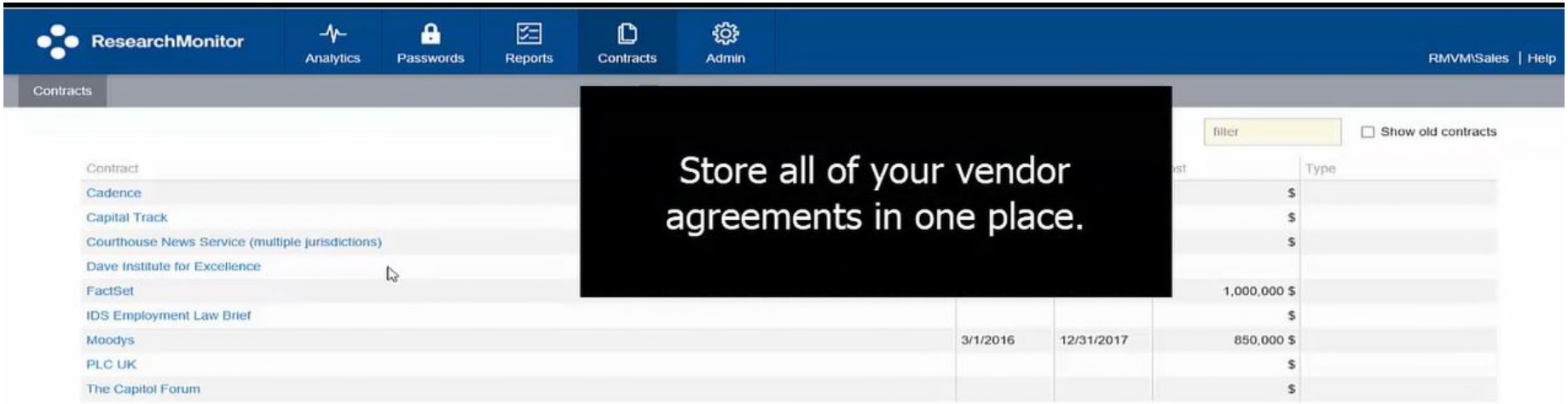
What is Contract Management?

Contract Management offers a single standard interface to record contract details, as well as provides the opportunity to view contract details along usage statics.
Eliminates auto-renewal of subscription services and reduces requirements for multiple copies of contract documents.

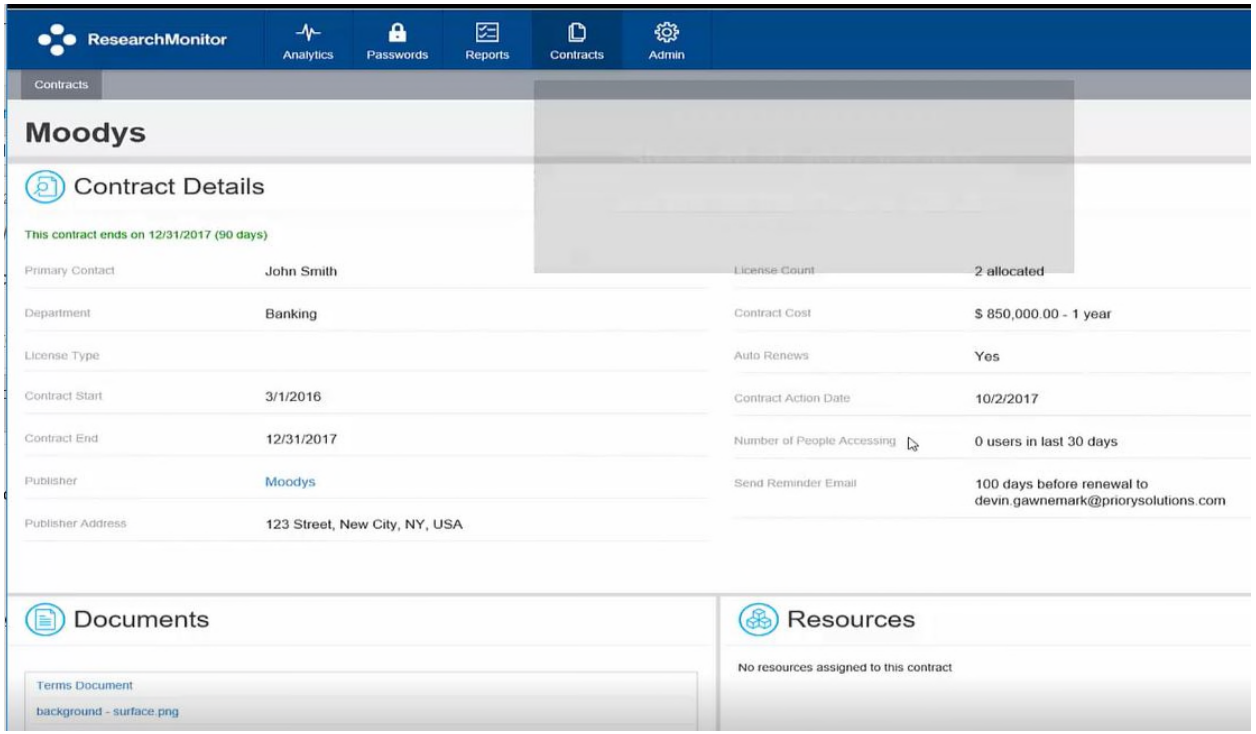
Key Features

- Automatic contract renewal notices via email
- Comprehensive set of contract details
- Links to electronic copy of contract documents.

Contract Management



Contract Management



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